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FinancialPlanning



Wealthtech Weekly

August 7, 2025

**By Rob Burgess**

Reporter

What are your favorite pieces of conference swag? I'd say snap-in cord organizers, hardcover notebooks with pen loops, portable power banks, stuffed animals (we have four kids) and wall chargers. [Here's how to ensure your firm's swag doesn't end up trashed.](#)

Speaking of conferences, I'm looking forward to attending Future Proof in September in Huntington Beach, California and [Advise AI](#) in October in Las Vegas. Will I see you? Let me know — robert.burgess@arizent.com.

I hope you'll check out the article, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

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TOP STORIES

WEALTH MANAGEMENT

How to get the best ROI on your firm's conference swag



If brands want to be remembered fondly by event attendees, experts say items with long-term usefulness outweigh cheap throwaways every time.

- **CFP Board picks Ph.D. advisor as 2026 chair-elect**
Terri Kallsen will precede him next year as chair of the Board of Directors; Seay will take over that role in 2027.
- **How much time is AI saving advisors? And how do they spend it?**
New tools help financial advisors with everything from logic to transcription, but many say it's not just about winning back minutes but also the quality of the output.
- **Advisors clamor for estate planning tools as attorneys wave red flags**
Adoption of these applications has grown exponentially, but some advisors and attorneys say caution is warranted.
- **Using AI to write that client email? Think twice.**

A Morningstar study found that clients who get AI-generated emails think their advisors should take a pay cut.

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Michael Kitces joins ADVISE AI 2025 PLUS registration is OPEN!

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